

**U.S. Department of Labor  
Employment Standards Administration  
Office of Workers' Compensation Programs**

**Energy Employee Occupational Illness  
Compensation Program**

**ECMS User's Reference Guide  
For  
Resource Center Staff**

**August 2005**

## 1. INTRODUCTION

This document is an updated version of the instruction material distributed at the training session held in Las Vegas, Nevada, from July 19-21, 2005. It includes instructions for ECMS Login, entering and updating Notes and Callups, and entering and updating Telephone Messages.

The document includes the following sections:

- Citrix ECMS Workstation Login
- Logging into the ECMS system
- Searching for Existing Cases
- Adding Case Notes
  - Add Note Screen
  - Add Note Form View
  - Fields to be completed
- Displaying and Updating Case Notes
- Adding Telephone Messages
  - Add Telephone Message
  - Add Telephone Message Form View
  - Fields to be completed
- Displaying and Updating Telephone Messages

## 2. CITRIX ECMS WORKSTATION LOGIN

This section contains the information that you need to **log into ECMS** (Energy Case Management System) via **Citrix**.

**Important -** You should have two sets of User IDs and Passwords:

- one set for network login
- one set for application login

***Note: Passwords are Case Sensitive***

In this section you use the network Username and Password to perform the Citrix login as indicated below.


Your application Username and Password are referenced later in this document.

If you have any questions about User Ids or Passwords, call the ESA Help Desk at 1(877) ESA-HELP (372-4357)

- Go to <https://seatsweb.dol-esa.gov>

## ECMS Resource Center User Reference Guide

- The ICA Web Client
  - Must be installed to access CITRIX
  - Is a one-time installation procedure




### Employment Standards Administration

NOTICE: This is a United States Department of Labor, Employment Standards Administration computer system, which may only be accessed and used for official Government business by authorized personnel. All information contained on DOL/ESA computer systems is owned by DOL/ESA and may be monitored, intercepted, recorded, read, or captured in any manner and disclosed in any manner, by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. Use of this computer system by any user, authorized or unauthorized, constitutes consent to this monitoring, interception, recording, reading, copying, or capturing and disclosure. Authorized users are responsible for the proper handling of the Government data, equipment, and resources which they access.


If you do not know your login information, please contact the ESA Help Desk.

### Employment Standards Administration MetaFrame XP Message Center

The Employment Standards Administration MetaFrame XP Message Center displays any informational or error messages that may occur.

 You do not have the ICA Client (ActiveX) for 32-bit Windows installed on your system. You must install the ICA Client to launch the applications.

Select the icon below to install the ICA Client.

 [ICA Web Client for 32-bit Windows](#)

Other Clients are available from the [Citrix Client download site](#)


### Login

☐ Username

☐ Password

☐ Domain

- In the **Citrix Login** window:
  - Enter your existing **ESA/Windows Domain User Name**
  - First time users: Enter the password Xpin####
    - #### represents the last 4 digits of your social security #
  - Click the **Login** button



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### Employment Standards Administration MetaFrame XP Message Center

The Employment Standards Administration MetaFrame XP Message Center displays any informational or error messages that may occur.

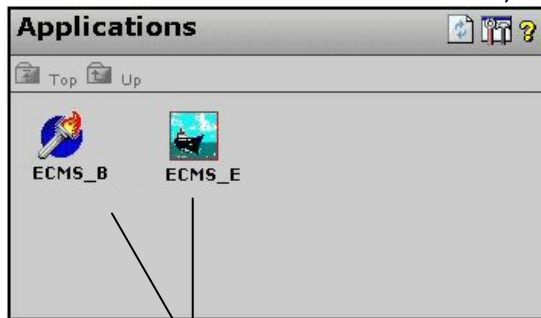
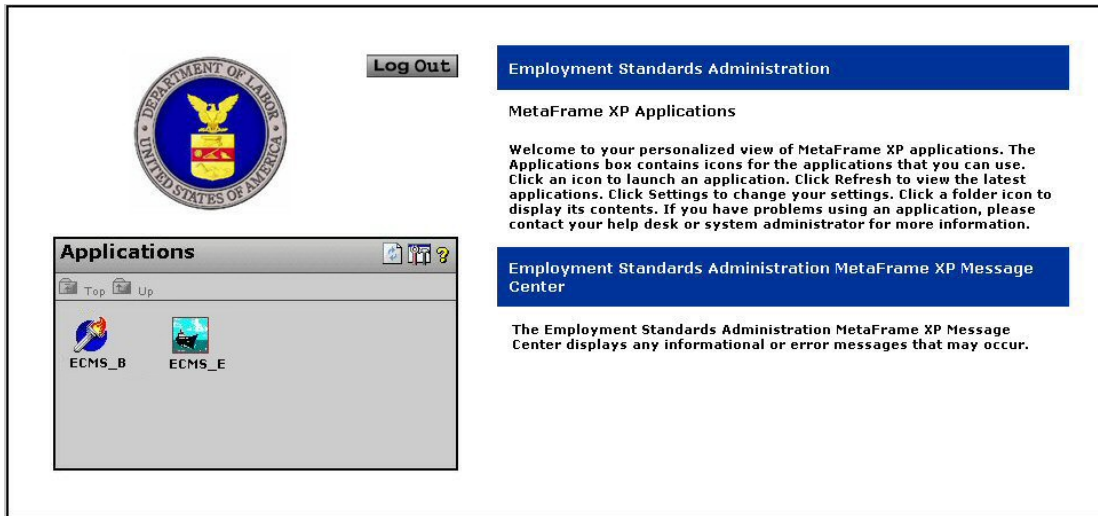
### Login

☐ Username

☐ Password

☐ Domain

- The **Citrix Login** Applications window opens containing two ECMS icons.



There are **three Citrix icons** on the applications toolbar:

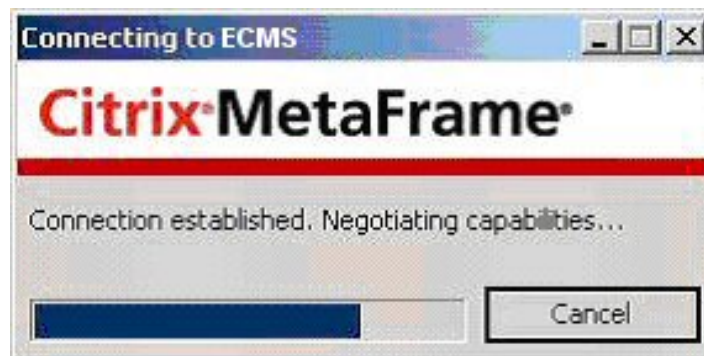
- The Refresh icon
- The Tool icon
- The Help icon

**Note** – Some of these icons or information in the Help file may not apply to our configuration of Citrix.

**ECMS** icons – See Section 3 for information on choosing system

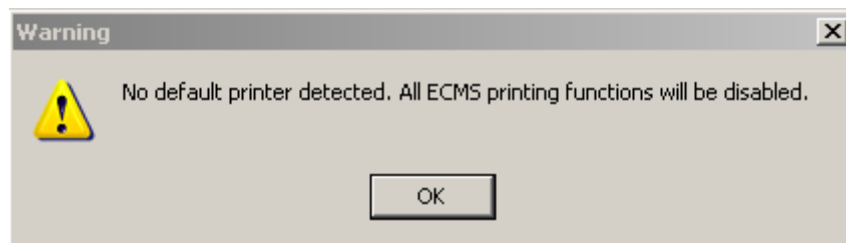
- Click the **ECMS\_B** icon (See Section 3)

This initiates the Citrix login process and you see the Citrix MetaFrame window.



## ECMS Resource Center User Reference Guide

- There are no print functions available on the ECMS system. A warning banner will appear to indicate that no printer is attached to the system. When it does appear, Click the **OK** button.

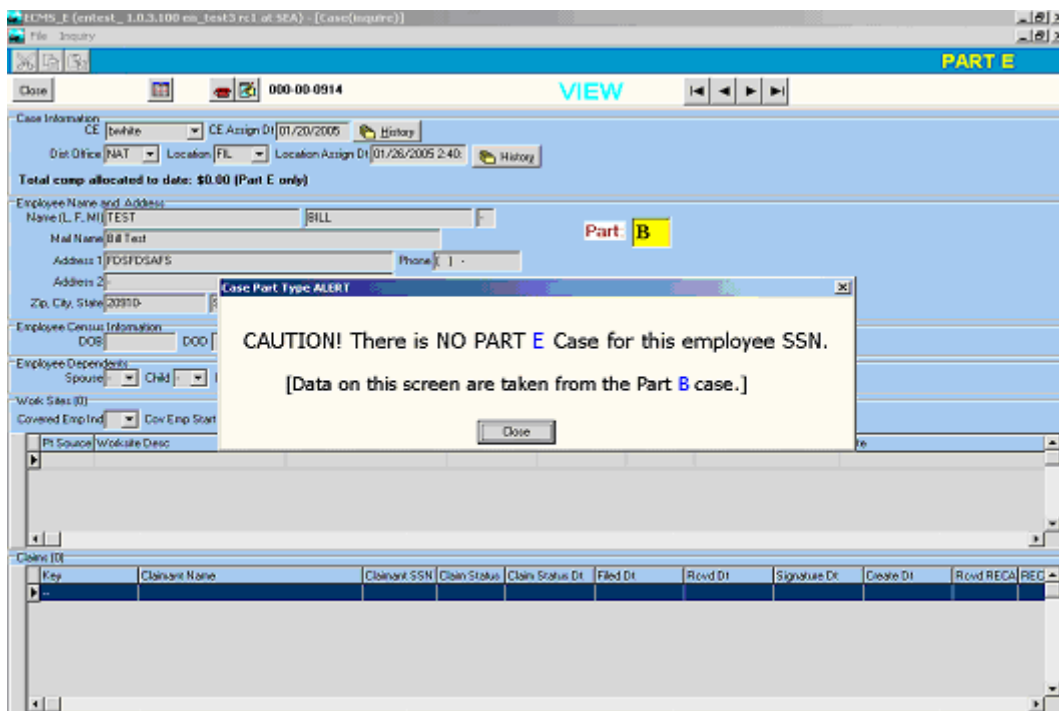


### 3. CHOOSING THE APPROPRIATE ECMS SYSTEM

Currently there are two applications of the Energy Case Management System: ECMS\_B and ECMS\_E. Each of these systems is used to manage and process energy worker compensation claims associated with different parts (subtitles) of the Energy Employees Occupational Illness Compensation Program Act (EEOICPA) passed in 2001 and amended in 2004. ECMS\_B is used to process claims submitted under Part B of the legislation. ECMS\_E is used to process claims submitted under Part E. The two systems function in the same manner and you will see the same screens and controls using either system. As a result, cases are identified by their 'part type', i.e., 'part' of the legislation) based on what kinds of claims are being handled. While all cases can be viewed in either system, the Part E claims data on those cases can be viewed only in ECMS\_E, while the Part B claims data can be viewed only in ECMS\_B.

There are actually three "Part Types" in the ECMS system: Part B (cases that have only 'B' claims), Part E (cases that have only 'E' claims) and Part EB (cases in which the claimant has submitted both an E claim and a B claim). For Part B-only cases and Part E-only cases, telephone messages and notes/callups should be entered into the appropriate version of ECMS. When entering calls and notes for EB claims, both systems are applicable and the information only needs to be entered once, in either ECMS\_B or ECMS\_E. However, the notes and telephone messages are viewable from either system. Therefore, when you are looking for all the calls and notes for an EB case, you can look in either system to see the notes and telephone messages in their entirety for any given case.

A final note on part types, if you attempt to open a Part B case in ECMS\_E you will receive this warning sign below displayed as a popup over the main Case screen. This message indicates that you are viewing a case that was entered from the other system.

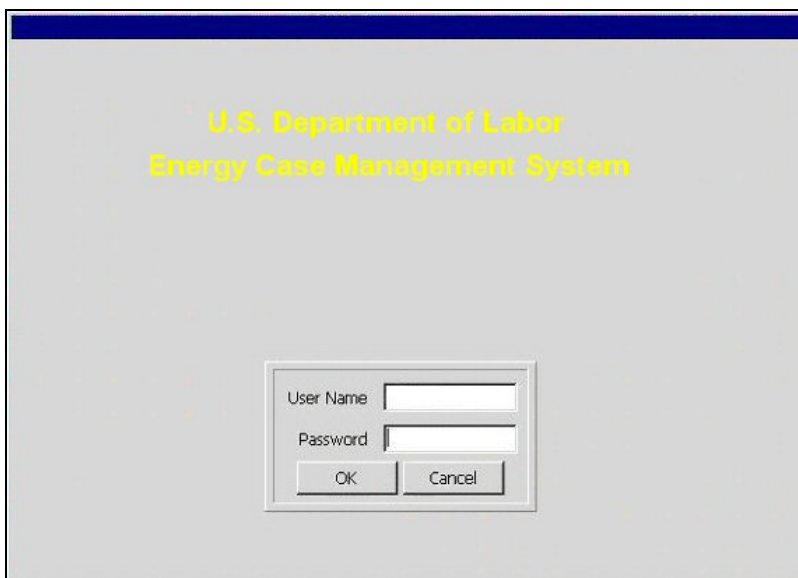


You will receive a similar warning if you try to open a Part E case in ECMS\_B. When you get this message, leave this version of the application and enter the appropriate one.

## ECMS Resource Center User Reference Guide

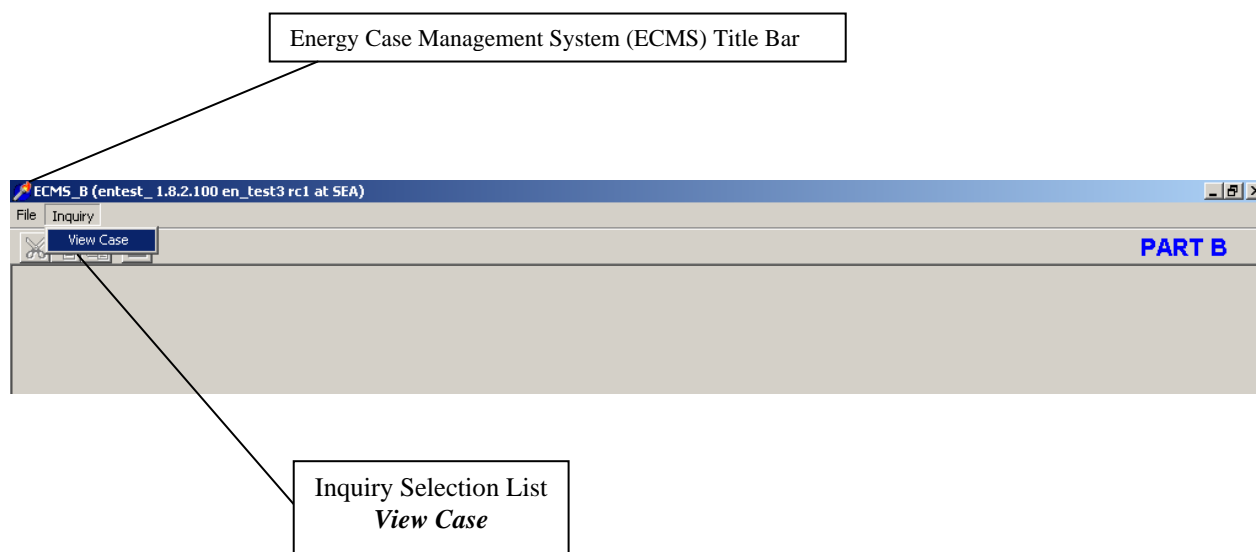
### Logging into the ECMS system

- When the ECMS Login window appears
  - Enter your **ECMS Application User Name and Password**
  - Click the **OK** button



Your application window appears and you are now logged into the application. When you exit the application, the Citrix session closes automatically and you are returned to your desktop.

If the login is successful you will see the following window on your screen. The title bar may be slightly different, as the (entest\_) item below is the name of the database that was used when creating this document. Yours will differ since you will be connected to a different database. The ECMS title though, will be the same.



## 4. SEARCHING FOR EXISTING CASES

### Case Search Screen

To **view, add or update notes** you must first select a case in order to open the notes function.

**To search for a Case:** Select *Inquiry* from Energy Case Management System menu and choose *View Case*. This displays the Case Search popup window<sup>1</sup>. Enter search criteria<sup>2</sup> in any of the combinations shown on the search screen. From the Case Search screen, if your selection criteria match only one case, the system displays the data on the Case Screen immediately. Otherwise, ECMS presents a list of cases (grid view) matching the selection criteria (as shown on page 8). You then select an individual case from the grid view.

The image shows a 'Case Search' window with a blue background. It has a title bar with a small icon and standard window controls. The main area is labeled 'Parameters' and contains several input fields: 'Search For' (a dropdown menu currently showing 'Employee'), 'SSN' (a text box with a blue background), 'Last Name' (a text box), 'First Name' (a text box), 'MI' (a small text box), 'DOB' (a date picker showing '\_\_\_/\_\_\_/\_\_\_'), and 'Docket No' (a text box). To the right of these fields are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

### To do an Employee Search:

1. Select Employee from list box
2. Enter Employee Social Security Number OR
3. All or part of Employee Last Name without or without all or part of First Name with or without Middle Initial OR
4. Employee Date of Birth

The above search can also be conducted using **Claimant and Payee** from the list box.

The image shows a 'Case Search' window with a gray background. It has a title bar with a small icon and standard window controls. The main area is labeled 'Parameters' and contains several input fields: 'Search For' (a dropdown menu currently showing 'Employee'), 'SSN' (a text box with a blue background), 'Last Name' (a dropdown menu currently open, showing 'Employee', 'Claimant', and 'Payee'), 'First Name' (a text box), 'MI' (a small text box), 'DOB' (a date picker showing '\_\_\_/\_\_\_/\_\_\_'), and 'Docket No' (a text box). To the right of these fields are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

1 Note: The ECMS\_B application has screens which have a gray background. The ECMS\_E application has screens which have a blue background. This is shown in the two Case Search Windows above. It's an easy way to know which system you are in. For more on which system to select, see Section 3.

2 Searches are more effective when entering at least 3 characters of the last name for the search criteria. If a search is not specific enough, the findings may be too large to use.



## ECMS Resource Center User Reference Guide

ECMS\_B (entest\_1.0.2.100 en\_test3 rc1 at SEA) - [Case(enquire)]

File Inquiry

Close

VIEW

PART B

Case ID	DE	Emp SSN	Total Comp	DOB	Last Name	First Name	Address 1	Address 2
EB CLE	enquire	125183185	\$0.00	01/01/1990	THOMAS	VIRGINIA	8002 PARK CREST	-
EB NAT	enquire	000-00-0409	\$0.00	06/12/1945	THOMAS	PRODUCTION	ADDRESS LINE ONE	-
EB NAT	enquire	000-00-0410	\$0.00	01/01/1945	THOMAS	PRODUCTION	ADDRESS LINE ONE	-
EB NAT	enquire	414-46-0672	\$0.00	-	THOMAS	ROCK	-	-
EB NAT	enquire	000-00-0568	\$0.00	02/02/1985	THOMAS	TEST BERMUDA	101 MAIN CONSTITUTION	-
EB NAT	enquire	000-00-0676	\$0.00	12/31/1985	THOMAS	TEST	DOL	-
EB NAT	enquire	000-00-0678	\$0.00	-	THOMAS	TEST	FFLO	-
EB NAT	enquire	000-00-0681	\$0.00	01/01/1985	THOMAS	CASE DATA TABLE	123 MOON BE	-
EB NAT	enquire	000-00-0691	\$150,000.00	03/03/1927	THOMAS	JOHN	-	-
EB NAT	enquire	000-00-0692	\$150,000.00	01/01/1935	THOMAS	TEST	DOL	-
EB NAT	enquire	000-00-0693	\$0.00	01/01/1950	THOMAS	CASE DATA TABLE	100 OAK	-
EB NAT	enquire	000-00-0694	\$0.00	01/01/1985	THOMAS	VERSION 1.6.5.3	MAIN DOL	-
EB NAT	enquire	000-00-0700	\$0.00	01/01/1940	THOMAS	TEST	100 ELM	-
EB NAT	enquire	000-00-0701	\$0.00	01/01/1935	THOMAS	TESTER	100 ELM	-
EB NAT	enquire	000-00-0800	\$0.00	01/01/1940	THOMAS	TEST NEW ADDITIO	100 ELM	-
EB NAT	enquire	000-00-0600	\$0.00	01/01/1945	THOMAS	TEST NEW NUM	-	-
EB NAT	enquire	000-00-0900	\$50,000.00	01/01/1940	THOMAS	TEST1	-	-
EB NAT	enquire	000-00-0706	\$0.00	01/01/1940	THOMAS	TEST NEW CASE FO	-	-
EB NAT	enquire	000-00-0708	\$0.00	-	THOMAS	TEST21111	11212123213123	-
EB NAT	enquire	111-00-0712	\$0.00	01/15/1999	THOMAS	WITH SAME NUMB	-	-
EB NAT	enquire	000-00-0715	\$0.00	01/01/1925	THOMAS	E	-	-
EB NAT	enquire	000-00-0717	\$150,000.00	01/01/1945	THOMAS	TEST	-	-
EB NAT	enquire	000-00-0718	\$0.00	01/01/1940	THOMAS	NEW TEST	-	-
EB NAT	enquire	000-00-0719	\$0.00	01/12/1940	THOMAS	TEST	100 ELM	-
EB NAT	enquire	000-00-0720	\$0.00	06/22/1982	THOMAS	JOHN	555 TEST STREET	-
EB NAT	enquire	000-00-0724	\$0.00	01/01/1940	THOMAS	TEST1	123 MAIN AVE	-
EB NAT	enquire	000-00-0731	\$0.00	-	THOMAS	TEST NEW CASE	MAIN DOL	-
EB NAT	enquire	000-00-0732	\$0.00	01/01/1933	THOMAS	PART E TESTING	MAIN DOL	-
EB NAT	enquire	000-00-0734	\$0.00	01/01/1933	THOMAS	TEST PART B WITH	MAIN DOL	-
EB NAT	enquire	000-00-0735	\$0.00	-	THOMAS	EB PART	MAIN DOL	-
EB NAT	enquire	000-00-0736	\$0.00	-	THOMAS	TEST CASE ADD B	MAIN DOL	-
EB NAT	enquire	000-00-0737	\$0.00	-	THOMAS	ADD CASE	DOL	-

A case can be selected by clicking on the **form button** once you have highlighted the case you want or by **double clicking** on the appropriate line for the desired claimant

Once you have highlighted a case in the grid, you can proceed directly to the notes screen by clicking the **notes button** or to the phone message screen by clicking the **phone button**.

### Grid view of cases from the previous page case search selection criteria

User right arrow to see the remaining grid view

ECMS\_B (entest\_1.0.2.100 en\_test3 rc1 at SEA) - [Case(enquire)]

File Inquiry

Close

VIEW

PART B

State	Zip	County	Phone	DOB	Orig User Nm	Orig Dt	Updt User Nm	Updt Dt	Case Id
MD	20910	USA	(513)705-215		green	01/22/2002 12:09:17 F en_test9		01/26/2005 12:02:37 F	18819
LA	52162	USA	( )		green	02/07/2002 9:05:04 A en_test9		01/26/2005 10:19:39 A	20107
-	-	-	( )	12/31/1999	green	02/07/2002 9:54:38 A abasi		01/25/2005 4:38:05 P	20112
-	-	-	( )	08/04/1994	tehrley	06/12/2002 9:54:17 A abasi		01/11/2005 9:54:52 A	27169
VA	20151	USA	( )		abasi	06/16/2003 1:47:51 P en_test9		01/25/2005 4:12:43 P	36368
DC	20036	USA	( )		abasi	07/30/2003 12:57:09 F en_test9		02/11/2005 12:41:29 F	36376
MD	20833	USA	(034)730-847		gracie	08/19/2003 10:38:40 F en_test9		01/25/2005 4:17:12 P	36378
DC	20008	USA	( )		abasi	08/22/2003 3:14:27 P en_test2		01/27/2005 10:28:05 A	36381
-	-	-	(510)591-60E	01/01/1999	abasi	09/15/2003 3:14:09 P en_test9		02/24/2005 2:27:52 P	36389
DC	20036	USA	( )		abasi	10/09/2003 9:18:28 A en_test9		01/26/2005 11:07:00 A	36390
MD	21401	USA	( )		abasi	10/14/2003 3:30:29 P abasi		01/27/2005 1:21:17 P	36391
DC	20008	USA	( )		abasi	10/15/2003 1:33:35 P en_test9		01/25/2005 4:25:10 P	36392
MD	20033	USA	(324)324-324		abasi	02/20/2004 10:24:12 F en_test9		01/21/2005 4:23:35 P	36399
MD	20833	USA	( )		abasi	02/20/2004 10:49:56 F en_test9		01/26/2005 8:47:19 A	36399
MD	20033	USA	( )		abasi	02/20/2004 10:56:07 F en_test9		02/24/2005 2:02:30 P	36400
-	-	-	( )	02/02/1999	abasi	02/20/2004 11:07:35 F abasi		01/25/2005 5:12:25 P	36401
-	-	-	( )	02/02/1999	abasi	02/20/2004 11:13:30 F en_test9		01/25/2005 5:00:53 P	36402
-	-	-	( )	01/01/1999	abasi	02/20/2004 11:17:59 F abasi		07/27/2004 3:28:54 P	36403
DC	20010	USA	( )		arnajid	02/20/2004 11:38:04 F abasi		01/25/2005 5:12:42 P	36405
-	-	-	( )	01/01/2004	abasi	03/02/2004 1:20:49 P en_test9		01/21/2005 11:48:12 A	36408
-	-	-	(222)222-222	03/15/1988	abasi	03/02/2004 1:34:31 P abasi		08/05/2004 1:55:01 P	36409
-	-	-	( )	01/01/2004	abasi	03/09/2004 11:20:43 F en_test9		02/11/2005 1:12:39 P	36411
-	-	-	( )	10/05/2003	abasi	06/08/2004 5:15:33 P en_test9		01/24/2005 2:19:29 P	36413
MD	20910	USA	( )		abasi	06/20/2004 11:27:49 F abasi		01/25/2005 4:04:53 P	36414
DC	20002	USA	(202)555-687		en_test9	08/10/2004 9:18:51 A en_test9		08/10/2004 9:19:04 A	36415
VA	22312	USA	( )		rahmad	08/12/2004 12:11:54 F en_test9		01/26/2005 12:05:56 F	36419
DC	20008	USA	( )		abasi	11/03/2004 12:04:42 F		-	36425
MD	20854	USA	( )		abasi	11/03/2004 12:05:51 F en_test2		01/27/2005 10:23:28 A	36427
DC	20007	USA	( )		abasi	11/03/2004 12:15:28 F		-	36429
DC	20005	USA	( )		abasi	11/03/2004 12:16:10 F		-	36430
DC	20001	USA	( )		en_test7	11/03/2004 12:51:22 F abasi		12/09/2004 4:12:45 P	36431
DC	20002	USA	( )		en_test7	11/03/2004 12:52:34 F en_test7		11/03/2004 12:58:43 F	36432

View after the right arrow.

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When you navigate to the *Case Screen* you will see the following:

Grid View Button      Phone Button      Note Button

ECMS\_B (en\_test\_1.0.2.100 en\_test3 rcl at SEA) - [Case Inquire]

File Inquiry

Close

VIEW

000-00-0409

Case Information

CE Invince CE Assign Dt: 02/07/2002 History

Dist Office: 0000 Location: FNA Location Assign Dt: 05/13/2002 4:05 History

Total comp allocated to date: \$0.00 (Part B only)

Employee Name and Address

Name (L, F, MI): TEST PRODUCTION

Mail Name: PRODUCTION

Address 1: ADDRESS LINE ONE Phone: -

Address 2:

Zip, City, State: 52162 POSTVILLE IA Country: USA

Employee Census Information

DOB: 06/12/1945 DOD: Sex: M Autopsy Ind: N Autopsy Facility:

Employee Dependents

Spouse: Child: Other:

Employment Classifications

DDE: Atomic: Y Beryllium: Y Uranium: Y Other: Y

Work Sites (2)

Covered Emp Ind: Cov Emp Start Dt: Cov Emp End Dt:

Pt Source	Worksite Desc	Title	From Dt	To Dt	Dosim Badge	Badge No	Note
B	SEAWAY INDUSTRIAL PARK	-			-	-	new worksite entry
E	SANDIA LABORATORY, SALTON SE Senior this and that and				-	-	This is a test

Claims (2)

Key	Claimant Name	Claimant SSN	Claim Status	Claim Status Dt	Filed Dt	Rcvd Dt	Signature Dt	Create Dt	Rcvd RECA	REC
000-00-0409 CI			UN	04/11/2005 10:4				04/11/2008		
000-00-0409 EM	Production Test	526-74-6559	W/S	10/06/2003 10:2	07/31/2001	07/30/2001	07/30/2001	09/13/2002 12:2	N	

The Case screen displays core employee-related information from the EE-1 and/or EE-2 claim form. Also included on this screen are the current CE assignment and case and district office locations. Access to historical assignments and locations is not available in this view.

The case screen lists the basic details of each case. From here you can:

- Navigate to the notes screen by clicking the Case Notes button
- Navigate to the phone message screen by clicking the Phone Button
- Return to the grid view you just came from by clicking the Grid button

When accessing ECMS to update existing Notes and Phone Messages, you will only be able to update records you created. You cannot edit records created by someone else.

## ECMS Resource Center User Reference Guide

Following are descriptions of all the fields shown on the illustration included on the preceding page:

1. Employee (Case) SSN: Cases are created and numbered using the employee's nine (9) digit SSN as the file number
2. Case Information
  - a. CE (Claims Examiner): CE responsible for handling the case
  - b. Location: Case location within current District Office
  - c. CE assign Date: Date responsible CE was assigned the case
  - d. District Office : Office the case is currently located (District Office or FAB offices)
  - e. Location Assignment Date: Date case assigned to the current location
3. Employee Name and Address
  - f. Name (Last, First. MI): Employee's name as it appears on the EE-1 or EE-2 claim form
  - g. Mail Name & Address : Employee's Name and Mailing Address  
*This field will be blank if the employee is deceased.*
4. Employee Census Information
  - h. DOB: Employee's Date of Birth
  - i. DOD: Employee's Date of Death (if applicable)
  - j. Sex
  - k. Autopsy Ind
  - l. Autopsy Facility
5. Employee Dependents: Spouse, Child, Parent, Grandparent, or Grandchild of the Deceased Covered Employee
  - a. Spouse: Wife or husband of that covered employee who was married to him or her for at least one year immediately before the death
  - b. Child: A 'child' includes a recognized natural child, a stepchild who lived with a covered employee in a regular parent-child relationship, and an adopted child
  - c. Other:
    - i. Parent: Father and/or mother including parent through adoption
    - ii. Grandparent: Parent of a parent of the covered employee
    - iii. Grandchild: Child of a child of the covered employee

## ECMS Resource Center User Reference Guide

- |                             |   |
|-----------------------------|---|
| 6. Employee Classifications | DOE, Atomic, Beryllium, Uranium, Other - As Reported on the EE-1 or EE-2 form   |
| 7. Work Site:               | All relevant worksite information taken directly from the claimant's EE-3 form or updated through employment verification process |
| a. Covered Emp Ind:         | 'Y' or 'N', as determined by the CE   |
| b. Worksite Desc:           | Worksite facility claimed for the employee  |
| c. Title:                   | Employee title as it appears on the EE-3 or verification document received  |
| d. Work Start Dt:           | The date the employee started working at the specified worksite as reported and/or verified in claims processing                  |
| e. Work End Dt:             | The date the employee stopped working at the specified worksite as reported and/or verified in claims processing                  |
| f. Note:                    | As needed including contractor/subcontractor name if applicable   |
| 8. Claims                   | Lists the name of each claimant on the case, and other related information on the claim.  |

## 5. ADDING A CASE NOTE

A note will be entered for every 'walk-in' customer at the Resource Center related to an existing case at DOL.

**To Add a Note:** After selecting a Case and having the Case screen displayed (see previous section), **click the Case Notes button**. ECMS responds differently based on the number of case notes which exist on the case. If there are no notes OR if there are two or more notes, ECMS displays the notes in a list (grid view). The sample below shows a case with no notes.

Next, press the **Insert** key on your keyboard. ECMS responds by displaying the Notes Form View screen (shown below). This is the screen where the Notes and associated data are entered.

### *Add Note Form View*

Diagram illustrating the fields and components of the Add Note Form View screen:

- Button to go to the Grid View
- Reason for Message selection box
- Case Number
- Listing of Claim Types selection box
- Note field allows for free form text of up to 2000 characters

**Enter the note** making sure to complete the following fields:

# ECMS Resource Center User Reference Guide

- (a) Note type - select "R" - FOR RESOURCE CENTER USE ONLY. (Note that there are other options here to select, but these are for district office use only.)
- (b) Claim Type - select from list the appropriate claim type: either EM-Employee, WI-Widow or C1-Child.
- (c) Note - Record the nature of the inquiry on the claim (up to 2000 characters).

After entering all required information on the notes, click **SAVE**, then click **CLOSE**.

When you select a case which has exactly one note, ECMS displays the note in detail Note Form View in 'CHANGE' mode – rather than displaying several notes in grid view. This allows you to update the note or go to add a note.

**To Add a Note when a case note is already displayed in Form View:** Click the Grid View button as shown below.

Button to go to  
the Grid View

ECMS 1.8.2.0 gracie ADPLite at NAT) - [cnote(update)]

File Edit Inquiry Functions Compensation Controls Reports Window Help

Close Save Cancel

410-68-6309

**CHANGE**

Case Note

Note Type: **Other** Claim Type: **EM EMPLOYEE**

Note:   
note

Assign To: **gracie** Callup Date:  Priority: **1** ☐ Private Note

Task Completed: **N** Or:  DD: **NAT** Case CE: **dspte**

Case Note Information

owner\_user\_nm: **gracie** owner\_dt: **04/18/2005 7:01:2** orig\_user\_nm: **gracie** orig\_dt: **04/18/2005 7:01:2**

updt\_user\_nm:  updt\_dt:

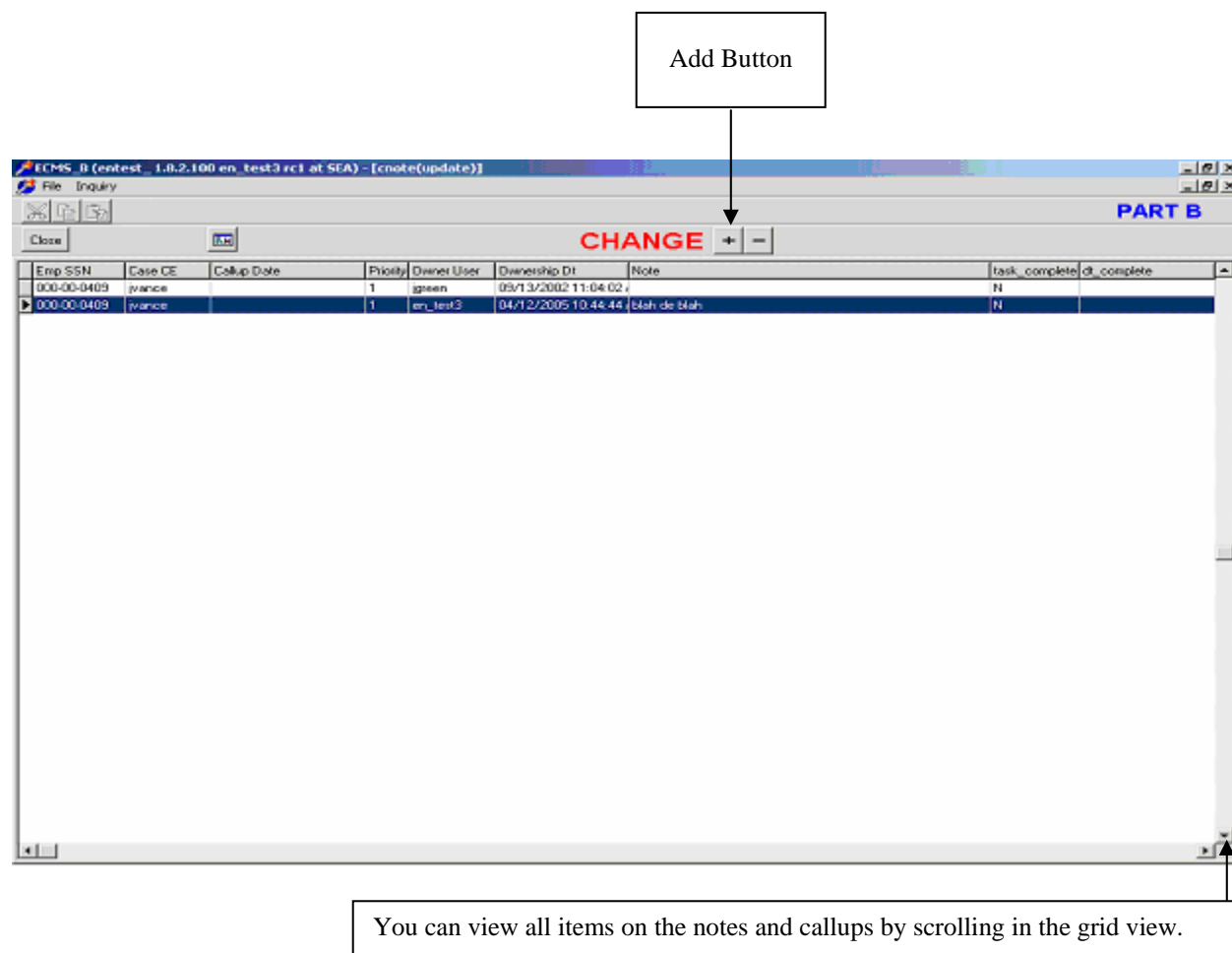
Callback/Addendum Notes (0)

Date	User	Note	Created By	Created On

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Next, click the Add (+) button as shown below.

This displays the Add Note Form View as noted earlier. This is where you enter your note, then click SAVE, then click CLOSE.



**SUMMARY STEP-BY-STEP ADDING A CASE NOTE**

1. Select a Case as detailed in Section 4.
2. *With Case screen displaying selected case, click the Note Button. This displays the Case Notes grid view or form view depending on number of notes..*
3. If the Case Notes Grid View is displayed, press the **Insert** key on the keyboard. *This opens the Form View for Adding a Case Note.*  
*OR*  
If the Case Notes Form View is displayed in CHANGE mode, click the Grid View button on the screen. *This displays the grid view.*  
Then press **Insert** key on the keyboard. *This opens the Form View for Adding a Case Note.*
4. Enter the Note along with required fields.
5. Click **SAVE** on the screen.
6. Click **CLOSE** on the screen



## 6. DISPLAYING AND UPDATING A CASE NOTE

To view or update notes you must first select a case in order to open the notes function.

**To Update a Note:** After selecting a Case and having the Case screen displayed (see previous section), **click the Case Notes button**. ECMS responds differently based on the number of case notes which exist on the case. If there are no notes OR if there are two or more notes, ECMS displays the notes in a list (grid view). The sample below shows a case with two notes.

**To view and update a specific note:** Doubleclick on the note line OR highlight the line with the mouse and press the **Enter** key on the keyboard. Make the appropriate changes to the note, click **SAVE**, then click **CLOSE**.

*Note: You will only be able to update your own notes, although you can view all notes on the case.*

If there is only one case note on the case, the Case Note Form View will be displayed, showing the note details. In this case, you will not need to select from the grid view as shown below. Simply enter your update, click **SAVE**, then click **CLOSE**.

Emp SSN	Case CE	Relation	Call Reason	Call Receive Date	Call Type	Claim Type	Call For	Caller Name
000 00-0408	ivance	Other	Other	04/12/2005 10:45:59 AM	R Return Call	EH	JDE	LARRY
000 00-0408	ivance	Other	Other	03/12/2002 1:48:07 PM	R Return Call	EH	JD GREEN	TEST

Users can view all items on the phone message by scrolling in the grid view.

## 7. ADDING A TELEPHONE MESSAGE

A telephone call will be entered for every incoming or outgoing telephone call at the Resource Center related to an existing case at DOL.

To view, add or update phone messages you must first select a case in order to open the phone message function. (See Section 4 for case selection instructions). This displays the Case screen with employee-related data as shown below.

The screenshot shows the ECMS Case screen for case 000-00-0409. The interface includes a menu bar (File, Inquiry), a toolbar with buttons for Close, Grid View, and Phone Message, and a 'VIEW' button. The case information section displays details for CE [vince], CE Assign Dt [02/07/2002], Dist Office [DOO], Location [FNA], and Location Assign Dt [05/13/2002 4:05]. The total compensation allocated to date is \$0.00 (Part B only). The employee name and address section shows Name (L, F, MI) [TEST], Mail Name [Production Test], Address 1 [ADDRESS LINE ONE], Address 2, Zip, City, State [52162], [POSTVILLE], [IA], and Country [USA]. The employee census information section shows DOB [06/12/1945], DOD, Sex [F], Autopsy Ind [N], and Autopsy Facility. The employee dependents section shows Spouse, Child, and Other. The employment classifications section shows DOE, Atomic, Beryllium, Uranium, and Other. The work sites section shows two sites: B (SEAWAY INDUSTRIAL PARK) and E (SANDIA LABORATORY, SALTON SE Senior this and that and). The claims section shows a table with columns: Key, Claimant Name, Claimant SSN, Claim Status, Claim Status Dt, Filed Dt, Rcvd Dt, Signature Dt, Create Dt, Rcvd RECA, and REC. The table contains two rows: one for key 000-00-0409 C1 and another for key 000-00-0409 EM Production Test.

Grid View Button

Phone Message Button

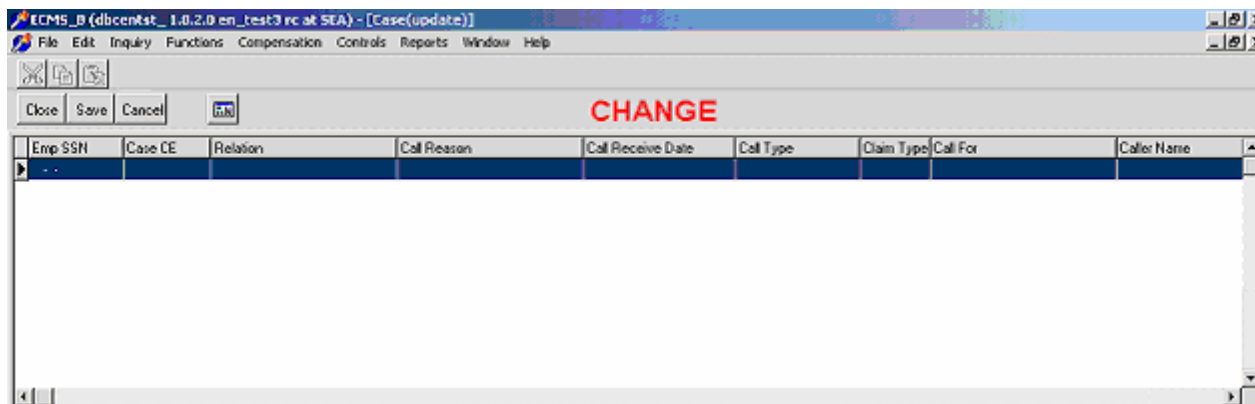
Key	Claimant Name	Claimant SSN	Claim Status	Claim Status Dt	Filed Dt	Rcvd Dt	Signature Dt	Create Dt	Rcvd RECA	REC
000-00-0409 C1			UN	04/11/2005 10:4				04/11/2005		
000-00-0409 EM	Production Test	526-74-6559	W/S	10/06/2003 10:2	07/31/2001	07/30/2001	07/30/2001	09/13/2002 12:2	N	

The case screen lists the basic details of each case. From here you can:

- Navigate to the phone message screen by clicking the Phone Message button
- Return to the grid view you just came from by clicking the Grid View button

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**To Add a Phone Message:** After selecting a Case and having the Case screen displayed, **click the Phone Message button**. ECMS responds differently based on the number of messages which exist on the case. If there are no messages OR if there are two or more messages, ECMS displays the messages in a list (grid view). The sample below shows a case with no phone messages.



The screenshot shows a software window titled "ECMS\_B (dbcentst\_1.0.2.0 en\_test3 rc at SEA) - [Case(update)]". The menu bar includes File, Edit, Inquiry, Functions, Compensation, Controls, Reports, Window, and Help. Below the menu bar are icons for a printer, a folder, and a document. A toolbar contains buttons for Close, Save, Cancel, and a button with a red "CHANGE" label. Below the toolbar is a grid with the following columns: Emp SSH, Case CE, Relation, Call Reason, Call Receive Date, Call Type, Claim Type, Call For, and Caller Name. The grid is currently empty, indicating no phone messages are present for this case.

Next, press the **“Insert”** key on the keyboard. This displays the Phone Message Form View as shown in the next page.

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Enter your phone message and complete the required fields as detailed on the following page.  
Then click **SAVE**, then click **CLOSE**.

### ***Add Telephone Message Form View***

The screenshot shows the 'Add Telephone Message' form in the ECMS application. The form is titled 'PART B' and includes a 'Case Phone Message' section. Callouts point to the following fields:

- Button to go to the Grid View:** A button labeled 'Grid View' in the top left corner.
- Reason for Call selection box:** A dropdown menu labeled 'Call Reason' with options: R-Resource Center Request, L-Lump Sum, M-Medical (pts, evals), O-Other, R-Resource Center Request (selected), T-Travel Authorization, W-Work/Employment Verification, and X-Requested Time Extension.
- Case Number:** A text field containing '000-00-0409'.
- Listing of Claim Types selection box:** A dropdown menu labeled 'Claim Type' with the option 'EM-EMPLOYEE'.
- Note field allows for free form text of up to 2000 characters:** A large text area for notes.
- Caller Name is a required text field:** A text field labeled 'Caller Name'.
- Relation of Caller to the Claimant selection box:** A dropdown menu labeled 'Relation' with the option 'Other'.
- Call For is a required text field:** A text field labeled 'Call For'.

The form also includes a 'Case Note Information' section with fields for 'owner\_user\_nm', 'owner\_dt', 'orig\_user\_nm', and 'orig\_dt'. At the bottom, there is a 'Callback/Amendment Notes' table with columns for 'Date', 'User', 'Note', 'Created By', and 'Created On'.

For every telephone call to be recorded in ECMS, **complete the following fields:**

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- (a) Call Reason - select "R" - *FOR RESOURCE CENTER USE ONLY.*

*(Note: There are other options here to select, but these are for district office use only.)*

- (b) Claim Type - select from list the appropriate claim type, either EM-Employee, WI-Widow or C1-Child..
- (c) Note - Record the nature of the inquiry on the claim (up to 2000 characters),
- (d) Caller Name - enter name of caller
- (e) Call For - enter name and/or title/position of person that caller asked to speak with; use "N/A" if specific person was not requested
- (f) Relation - select from list - caller's relationship to the claimant identified in *Claim Type* field.
- (g) Received by - system will default to logged-in user id.
- (h) Call Type - select from list: "D-Direct Call", when a telephone call is received. "O-Outgoing Call", when the RC staff initiates the telephone call. (Message the "R-Returned Call" option is for district office use only.)
- (i) Receive date - system will default to current date
- (j) Callback No. - enter caller's phone number, if provided by caller.
- (k) Assign to - select your user name/id.
- (l) Call Completed - *all of the RC calls should be "Y"*, since you will complete the call. If a callback is required, you would initiate a new telephone call message. (Do NOT use the "N" option; this is for district office use only.)

*Remember:* After entering all required information on the messages, click **SAVE**, then click **CLOSE**.

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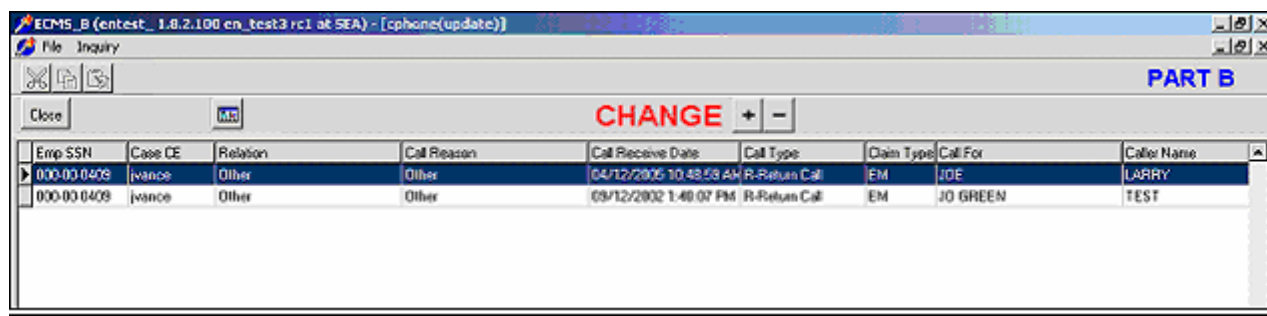
As with the case messages, if there is only one phone message on the case on which you want to add a phone message, the message will be displayed in the Phone Message Form View in CHANGE mode. To add a message from this screen, click the Grid View button.

Button to go to  
the Grid View

The screenshot shows the ECMS\_B 1.8.2.0 application window. The title bar reads "ECMS\_B ( 1.8.2.0 gracie ADPLite at NAT) - [cnote(update)]". The menu bar includes File, Edit, Inquiry, Functions, Compensation, Controls, Reports, Window, and Help. The toolbar contains icons for Close, Save, Cancel, and a Grid View button. The main window is titled "PART B" and displays "410-68-6309" and "CHANGE" in red. The "Case Note" section has a "Note Type" dropdown set to "Other", a "Claim Type" dropdown set to "EM-EMPLOYEE", and a text area for the note. Below the text area are fields for "Assign To" (gracie), "Callup Date", "Priority" (1), and a checkbox for "Private Note". There are also fields for "Task Completed" (N), "On", "DO" (NAT), and "Case CE" (dspte). The "Case Note Information" section shows "owner\_user\_nm" (gracie), "owner\_dt" (04/18/2005 7:01:2), "orig\_user\_nm" (gracie), and "orig\_dt" (04/18/2005 7:01:2). The "Callback/Addendum Notes (0)" section is empty. A callout box points to the "Grid View" button in the toolbar.

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ECMS will display the grid view of messages with the Add (+) and Delete (-) buttons. Click on the Add (+) button to open the Add Phone Message Form View. Enter the message with required fields, then click **SAVE**, and then click **CLOSE**.



Emp SSN	Case CE	Relation	Call Reason	Call Receive Date	Call Type	Claim Type	Call For	Caller Name
000-00 0408	ivance	Other	Other	04/12/2005 10:48:58 AM	R-Return Call	EM	JOE	LARRY
000-00 0408	ivance	Other	Other	09/12/2002 1:40:07 PM	R-Return Call	EM	JO GREEN	TEST

**SUMMARY STEP-BY-STEP ADDING A PHONE MESSAGE**

1. Select Case as detailed in Section 4.
2. *With Case screen displaying selected case*, click the Phone Button.  
*This displays the Phone Messages grid view or form view depending on number of notes.*
3. If the Phone Messages Grid View is displayed, press the ***Insert*** key on the keyboard. *This opens the Form View for Adding a Phone Message.*  
***OR***  
If the Phone Messages Form View is displayed in CHANGE mode, click the Grid View button on the screen. *This displays the grid view.*  
Then press ***Insert*** key on the keyboard. *This opens the Form View for Adding a Phone Message.*
4. Enter the Message along with required fields as noted in this section.
5. Click **SAVE** on the screen.
6. Click **CLOSE** on the screen.



## 8. DISPLAYING AND UPDATING A TELEPHONE MESSAGE

**To view or update phone messages:** You must first select a case in order to open the messages function.

**To Update a Message:** After selecting a Case and having the Case screen displayed (see previous section), **click the Case Messages button**. ECMS responds differently based on the number of phone messages which exist on the case. If there are no messages OR if there are two or more, ECMS displays the messages in a list (grid view). The sample below shows a case with two messages.

**To view and update a specific message:** Doubleclick on the message line OR highlight the line with the mouse and press the **Enter** key on the keyboard. Make the appropriate changes to the message, click **SAVE**, then click **CLOSE**.

*Note: You will only be able to update your own messages, although you can view all messages on the case.*

If there is only one case message on the case, the Case Message Form View will be displayed, showing the message details. In this case, you will not need to select from the grid view as shown below. Simply enter your update, click **SAVE**, then click **CLOSE**.

Emp SSN	Case CE	Relation	Call Reason	Call Receive Date	Call Type	Claim Type	Call For	Caller Name
000-00-0409	wance	Other	Other	04/12/2005 10:48:59 AM	R Return Call	EM	JOE	LARRY
000-00-0409	prance	Other	Other	05/12/2002 1:49:07 PM	R Return Call	EM	JO GREEN	TEST

Users can view all items on the phone message by scrolling in the grid view.